

Successful Business Strategies to Prevent Heart Disease and Stroke



TOOLKIT GUIDE

**Heart-Healthy and
Stroke-Free Worksites**



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**Mission of CDC's State Heart Disease
and Stroke Prevention Program:**

To provide public health leadership to improve cardiovascular health for all, reduce the burden of cardiovascular disease, and eliminate disparities associated with heart disease and stroke.

HEART-HEALTHY AND STROKE-FREE AT WORK: SUCCESSFUL BUSINESS STRATEGIES TO PREVENT HEART DISEASE AND STROKE

TOOLKIT GUIDE

I. INTRODUCTION

“Healthy citizens lead to a healthy economy”

—Adam Smith, The Wealth of Nations, 1804

Heart disease and stroke, the principal components of cardiovascular disease (CVD), are among the nation's leading causes of death and disability. Heart disease is a leading cause of permanent disability among working age adults.¹ Heart disease and stroke are also the most expensive health conditions to businesses. The good news is that employers can save on health care costs by taking action.

In 2002, the US Centers for Disease Control and Prevention (CDC) initiated the *Heart-Healthy and Stroke-Free at Work* project to identify effective interventions and approaches that can influence employers to buy prevention-related benefits for cardiovascular health (CVH). The *Heart-Healthy and Stroke-Free at Work* project produced evidence that certain health plan benefits and worksite programs can improve the health of employees, prevent heart disease and stroke, and produce cost savings.

During Phase 1 of the *Heart-Healthy and Stroke-Free at Work* project, we conducted formative research to identify effective interventions and promising practices for preventing heart disease and stroke (with a focus on controlling high blood pressure and cholesterol) at the worksite, through health plans, and in health care settings. This research included a literature review and analysis of CVH interventions. Interviews were also conducted with six employers/purchasers and three health plan providers that implemented promising practices with successful outcomes. The results of this research served as the basis for the following *Toolkit* components: *Reducing the Risk of Heart Disease and Stroke: A Six-Step Guide for Employers*, and *Evaluating Health Plan Benefits and Services to Promote Cardiovascular Health and Prevent Heart Disease and Stroke*.

Phase 2 focused on the development of the *Heart-Healthy and Stroke-Free Toolkit of Successful Business Strategies to Prevent Heart Disease and Stroke*. It is designed to assist State Heart

- Nearly all employers (96%) report being critically or significantly concerned about health care costs.²
- Only 18% of employers are very confident in their ability to manage increases in health care costs.³

² Hewitt Associates, Health Care Expectations: Future Strategy and Direction, 2004

³ Creating a Sustainable Health Care Program: Eighth Annual Washington Business Group on Health/Watson Wyatt Survey Report, 2002

¹ American Heart Association. *Heart Disease and Stroke Statistics: 2005 Update*.

Disease and Stroke Prevention Programs (referred to in this guide as state programs) in making the business case to employers. The *Toolkit* provides state programs with suggestions about which health benefits, services, and interventions can improve employee cardiovascular health, prevent heart disease and stroke, and reduce related costs.

The Role of State Programs in Worksite Heart Disease and Stroke Prevention Benefits and Services

State programs focus on promoting policy, environmental, and system changes and on providing education to improve cardiovascular health and prevent heart disease and stroke in populations throughout the nation. To meet these goals, state programs partner with and seek to motivate those in leadership positions who make policy and environmental changes in health care settings, workplaces, schools, and the community. In the business community, state programs provide leadership by:

- Promoting the importance of comprehensive heart disease and stroke prevention programs at the state and regional levels, rather than approaching businesses one-on-one or providing direct services to worksites.
- Working at the macro level (the highest level of change) through direct service organizations to provide technical assistance in program design and evaluation to businesses.
- Disseminating best and promising practices that demonstrate successful worksite policy and environmental changes that realize cost savings.
- Establishing and coordinating partnerships with organizations that encourage businesses to implement heart disease and stroke prevention policies and system changes. (See Section IV for a complete list of macro-marketing strategies).

The *Successful Business Strategies to Prevent Heart Disease and Stroke Toolkit* provides information, materials, and tools that state programs can reference and distribute to businesses, primarily through employer and professional organizations. The *Toolkit* also assists state programs in addressing these CVH priority areas:

- Providing health care coverage for employees and their families that includes primary and secondary prevention services addressing heart disease and stroke, as well as rehabilitation services for heart attack and stroke survivors.
- Assuring detection and follow-up services with employees at the worksite to control high blood pressure and cholesterol.
- Promoting adequate cost coverage or reimbursement for prescription drugs required for secondary prevention of heart disease and stroke.
- Assuring implementation of policies that support employee training and education on signs and symptoms of a heart attack and stroke, the importance of calling 9-1-1,

cardiopulmonary resuscitation (CPR) methods, and the use of automated external defibrillators (AEDs).

The *Toolkit* also provides an ideal resource for state programs to collaborate with other chronic disease partners throughout the state in developing comprehensive CVH worksite programs and cultivating “champions” who will promote these activities. States should not use CDC Heart Disease and Stroke Prevention funds to pay for individual worksite lifestyle change programs. Employers can contact other agencies and use other resources referenced in the *Toolkit* for this purpose.

Purpose of This Guide

The purpose of this guide to the *Toolkit* is to assist state programs to:

- Use *Toolkit* materials and resources effectively with employer and purchaser groups and organizations at the state, regional, and local levels.
- Plan and execute marketing activities to reach and engage business organizations.
- Present a compelling case that persuades business leaders and organizations to support interventions to promote CVH and prevent heart disease and stroke.

II. TOOLS YOU CAN USE

The materials in this *Toolkit* are intended to motivate employers to provide prevention health benefits and services for their employees and establish effective worksite programs to prevent heart disease and stroke. State program staff can use all or some of these materials, depending on the type of meeting or presentation conducted with an employer, business group, or health association. A CD-ROM with all the *Toolkit* materials is included for easy reproduction and adaptation. Materials will also be available online at www.cdc.gov/cvh. The *Toolkit* provides the following resources:

Tool	Purpose
Reducing the Risk of Heart Disease and Stroke: A Six-Step Guide for Employers	A handout that allows users to make the case to employers for investing in comprehensive programs and services to prevent heart disease and stroke. It includes information about promising employer practices and effective interventions. It will also allow employers to estimate how much they can save on costs related to health care, absenteeism, and lost productivity by investing in these programs.
Evaluating Health Plans Benefits and Services to Promote Cardiovascular Health and Prevent Heart Disease and Stroke	A checklist to help employers choose and negotiate a health benefits package that fits their business and workforce.
Promising Practices Summary and Koop Award Winners	A summary of successful programs in different worksite and health care settings for preventing heart disease and stroke.

Tool	Purpose
PowerPoint Presentation	A presentation for employers and business groups using the information in the <i>Six-Step Guide for Employers</i> .
CVD and Business Glossary	Definitions and business terms related to heart disease and stroke prevention and disease management.
Additional Resources	Information such as national guidelines, additional worksite toolkits and assessment tools, performance measurement tools, and associations and agencies that address heart disease and stroke prevention.
Articles	Selected articles on prevention benefits and services that support the business case for cardiovascular health.

III. MACRO-MARKETING: DEFINITION AND BENEFITS

Macro-marketing is an approach for reaching and selling to organizations in a market on a large scale. This approach involves providing information at one time to multiple business groups or organizations composed of employers and their key managers and leaders. This efficient approach makes it possible to engage a larger target audience and gain their support for interventions that will improve employee health.

IV. COMPONENTS OF A MACRO-MARKETING EFFORT

1. “Grass-Top” Level Support

Successful worksite health promotion programs often have the support of corporate leaders and decision makers. Business leaders who believe that heart disease and stroke prevention programs benefit their employees and the company’s bottom line will carry this message to other employers and encourage their support, as well as taking action within their own companies.

Business leaders are important champions because of their influence, credibility, connections, and resources. They can help state programs extend the reach of heart disease and stroke prevention messages in many ways, such as participating in a special community task force, offering to establish a model worksite program at their company, and talking to other business leaders about the benefits of worksite heart disease and stroke prevention interventions. They can help spread the word about such benefits as reducing company health care costs, improving employee health and productivity, and supporting healthy communities.

Gaining support from business leaders will take time and effort because they are often inundated with requests to support many other worthy causes, and usually have many competing priorities for their time. Thus, it is important to focus resources on business leaders who may already be concerned with employee and worksite health issues, such as those involved with local business health coalitions, those who sit on health association boards, or those whose companies support local health events such as the American Cancer Society’s Great American Smoke Out or Relay for Life.

Key types of decision-makers include:

- Chief Executive Officers (CEOs) and Chief Financial Officers (CFOs).
- Senior managers in human resources, benefits, occupational health, and health promotion.
- Civic leaders.
- Political leaders.
- Influential health professionals.
- Labor union leaders.

2. Partnerships with Local Employer Groups and Health Associations

State program staff often do not have the time or resources to meet individually with every business in their state to promote heart disease and stroke prevention efforts and benefits for employees. Thus, they may want to focus outreach efforts on state and local chapters of organizations whose employer members are interested in learning the latest trends related to employee health and health care cost savings, such as the following:

- Society of Human Resource Managers.
- Business and benefit consultants.
- Rotary, Lions, or Kiwanis clubs.
- State and local chambers of commerce.
- Small Business Administration groups.
- Health coalitions.
- Local business coalitions.
- Women-owned business groups.
- Associations of manufacturers, textile makers, food producers, retailers, hospitals, automobile dealers, bankers, lawyers, financial planners, occupational health providers, health insurance plans, etc.
- Franchise groups including fast food, dry-cleaners, quick service restaurants, retailers, etc.
- African-American, Hispanic, Asian, Native American or other ethnic business groups; professional organizations; and sorority and fraternity alumni associations.

Getting buy-in and support from senior leaders in an association is key to securing an opportunity to meet with or present to the association (or its local chapter) as a whole. Consider first approaching one or more of the following association leaders:

- President.
- Programming coordinator.
- Public relations or membership director.
- Health benefits manager.

Each organization offers unique opportunities for state programs to reach its members. These are just a few:

- Be a guest speaker at a monthly meeting.
- Coordinate a seminar or workshop on the topic of CVH and business for an organization's members.
- Write a monthly or quarterly CVH and business column for an organization's newsletter or website.
- Work with the organization to send heart disease and stroke prevention information to their members through special direct mailings or e-mails.

3. Community Awareness and Education

Educating employers, employees, and the general population through local and statewide media news outlets can help to generate and sustain a “buzz” around CVH issues, which can affect companies' decisions to address heart disease and stroke prevention benefits and services. Media campaigns can help educate employers and the general population about how a company's bottom line can be affected by the healthcare and lost productivity costs associated with heart attack or stroke. Employers can be exposed to key messages numerous times through different communication channels when these activities are conducted in tandem with grass-top level support efforts.

News stories can also help spread the word. Stories can focus on ways companies are able to lower their healthcare costs, improve worker productivity, and implement successful interventions, resulting in positive returns on investment and employees with improved health (lower cholesterol or blood pressure). Such news stories can also help to increase public awareness of the state program's initiatives with business leaders.

The following types of news media representatives will most likely be receptive and interested in writing stories about heart disease and stroke prevention benefits at worksites:

- Business reporters and producers at local newspaper, television, and radio outlets;

- Health and business beat reporters from the Associated Press wire service whose news stories are often published in large and small newspapers across the state; and
- Reporters at local and national business newspapers, magazines, and websites.

V. PLANNING A MACRO-MARKETING EFFORT

Conducting macro-marketing activities takes time, organization, and leadership. The following start-up checklist can help state programs begin.

Start-Up Checklist

- ☑ **Involve the right people.** Identify others in the state health department or in the community who have successfully worked with businesses and worksites, and ask them for lessons they learned and contacts they made with business organizations. Identify local chapter leaders of national organizations such as the American Heart Association or the National Business Coalition on Health. These types of organizations often share a similar mission as the state program, and they may be willing to coordinate efforts with state programs to market efforts to their membership.
- ☑ **Select a strong leader.** Assign a staff member with leadership and communication skills and the ability to plan and implement activities to approach business groups. This person needs to be creative and skilled in bringing others with similar interests together. If staff resources are limited, an outside consultant or community leader may be needed to oversee activities.
- ☑ **Create a unified vision.** Develop a vision statement defining what the success of this project would look like. Having a vision statement in place will unify the effort and serve as the basis for creating goals, strategies, and activities in support of this vision. For example, consider this vision statement from District 8 of the Texas Department of Health:

“We commit, through personal and organizational excellence, to be an agent of change dedicated to achieving a healthier Texas.”

- ☑ **Create a plan of action with goals, strategies, and activities.** Goals help to define what must be accomplished to achieve the vision. Strategies describe the activities needed to meet the goals. Determine what strategies are needed to make progress with business and turn these into action steps.
- ☑ **Develop ways to measure progress.** Creating change takes time. Tracking achievements will help maintain the momentum necessary for success. Once goals, objectives, and strategies have been developed, identify how they can be evaluated.
- ☑ **Recognize partners’ contributions.** Take the time to let partners know their time, effort, and ideas are appreciated. “Thank you” goes a long way.

VI. IMPLEMENTING MACRO-MARKETING ACTIVITIES

The plan of action may incorporate a variety of suggested macro-marketing outreach efforts. Below are some suggested activities and steps to help orchestrate them.

Activate a Heart Disease and Stroke Prevention Business Task Group

Work with a state or local heart disease and stroke prevention coalition or council to create a small task group focused on worksite issues and how to best reach influential business leaders.

1. Identify three to five influential coalition or council members who could participate in the small task group.
2. Send or e-mail a letter inviting them to be part of the task group. The letter should specify the purpose of the task group, roles and responsibilities of members, and time commitment involved. With the letters, include a copy of the *Six-Step Guide for Employers*.
3. Make follow-up calls to secure participation.
4. Reach an agreement with task group members on their level of involvement, opportunities they can help create, organizations they may connect to your state program, and their preferred method of communication (i.e., e-mail, phone, face-to-face).
5. Develop an action plan and ask task group members for feedback and input. Development activities could include:
 - a. Developing or refining critical messages, directed to local businesses that address employer preventive health services and benefits to reduce heart attacks and strokes.
 - b. Recommending contacts at business organizations that could be approached to discuss opportunities for speaking engagements or disseminating information.
 - c. Authoring op-ed letters for local business publications.
 - d. Identifying a local spokesperson or guest speaker for state program presentations.
 - e. Suggesting additional private sector funding for activities.
6. Keep the task group regularly apprised of activities, challenges, and opportunities via e-mail, conference calls, or face-to-face meetings.

Plan a Series of Presentations throughout the State on the Topic of Heart Disease and Stroke Prevention and Business

1. Develop a list of business and community organizations to target, determine when and where they meet, and identify a key contact.
2. Create and send a letter requesting the opportunity to conduct a presentation at a business meeting.
3. Send a follow-up letter to and call the key contact to explain why the organization's members would benefit from a presentation.

4. Secure support and involvement from the organization.
5. Determine the role and responsibilities of the state program and the organization.
6. Modify the PowerPoint presentation provided in the *Toolkit*, and prepare handouts for distribution. Tailor the resources in this *Toolkit* to meet the needs and interests of the organization.
7. Rehearse the presentation and anticipate questions.
8. After the presentation/workshop, follow up with any members who expressed interest in initiating or expanding their heart disease and stroke prevention program, services, or benefits. Provide one-on-one follow-up to anyone who has shown interest, and refer them to additional resources.

Conduct Media Outreach Efforts to Help Raise General Awareness and Support for Heart Disease and Stroke Prevention Interventions at the Worksite

Getting messages and information into the media's spotlight can be achieved in numerous ways. It may take a combination of these suggested activities and others to generate and sustain news coverage.

1. Create short blurbs for business and company newsletters.
2. Contact reporters with story ideas.
3. Invite reporters to presentations and meetings to keep them apprised of new studies and research showing the impact of heart disease and stroke prevention benefits and services on employee health, productivity, and health care costs.
4. Seek out opportunities to be a guest on "talk-radio" stations that cater to business, or appear on weekend TV shows including local cable stations (e.g., "ask the experts" or "health focus").
5. Develop a public service announcement (PSA) campaign and place PSAs in business newsletters or in the business section of a local newspaper. Depending on available funds, consider buying advertising space to guarantee that the ads will be printed or aired.

Before conducting any awareness-raising activities with the media, answer these questions:

- **What is your communication goal?** Are you trying to generate awareness that businesses need to invest in prevention-related benefits for heart disease and stroke?
- **Who is the audience you are trying to reach?** Are you targeting the general community or do you want to reach only business people? If you want to reach business people, contact the media and reporters that focus on them.

- **What are the key messages?** Determine the three statements you want your news story to tell, and make sure to express them clearly when talking to the media.
- **What is your “news hook”?** The media want to know the story you are trying to tell, why it is relevant to their readers, and what makes it newsworthy. It is important to know how to “frame” your key messages so that you can attract media attention.
- **What communications tools will you use and how will you disseminate them?** Use one or a combination of these depending on the media: press releases, fact sheets, letters to the editor, articles, or short announcements with compelling facts for newsletters.
- **Who are your spokespeople?** If you are the spokesperson, rehearse with someone beforehand and role-play types of questions and answers. If you have another spokesperson, role-play with them to be certain they include the key messages and are adequately prepared.
- **When do you want to execute your media strategy?** Determine the timing of when materials will be approved, and when can you begin contacting media.

For more information about working with the media, consult *Take Action for Heart-Healthy and Stroke-Free States: A Community Guide for Policy and Environmental Change*, available on CDC’s Cardiovascular Health Web site at www.cdc.gov/cvh/state_program/.

VII. PERSUADE BUSINESS LEADERS AND ORGANIZATIONS TO SUPPORT HEART DISEASE AND STROKE INTERVENTIONS

The macro-marketing activities described in this guide will result in opportunities to communicate directly with decision-makers and employers. What are the best ways to convince decision-makers to adopt and commit to establishing heart disease and stroke prevention benefits and services for their employees? The tips below will assist in this communication process.

Set the Stage

Follow the 80/20 principle. It is often said that one gets 80% of the benefits out of 20% of the effort. With multiple demands on staff time, it is best to identify and concentrate on the activities that fall within that 20% area, and direct time and energy toward the decision-makers who are most receptive and responsive to the issue of heart disease and stroke prevention.

Have a plan ready for the decision-maker. Before speaking with decision-makers (henceforth referred to as “clients”), it is important to know what actions you want them to take. Try to understand the client’s position and needs, the organization he or she represents, and his or her personality. Tailor your messages to the client’s needs. Recommend specific steps for employers to take and encourage them to commit to initial steps on the various options proposed. For example, if they are not receptive to hearing about health insurance options, ask to set up a meeting with the director of human resources or the benefits manager to discuss a heart disease and stroke prevention plan that is customized to match their needs and available resources.

Take a client-oriented approach. Take a client-oriented approach to promoting heart disease and stroke prevention programs, rather than a program-oriented approach. The client-centered approach identifies the benefits of the project that are most relevant to the client's perceived needs. A program-oriented approach revolves around a description of the program itself. The most effective way to ensure that communication is client-oriented is to ask open-ended questions to identify the decision-maker's needs. For example: When inquiring about available funds and resources, you may want to ask: What resources do you have to support a heart disease and stroke prevention program?

Use open-ended comments or questions to identify needs. You can use open-ended questions and active listening skills to identify and confirm client needs, respond to indifference, clarify misunderstandings, and respond to objections. Open-ended questions require elaborated responses. Here are a few examples of open-ended questions that may provide insight into the client's concerns:

- What prompted you to contact me?
- How would you describe your company?
- What are you hoping to accomplish with your cardiovascular health promotion program?
- What are your greatest concerns about employee health or health care?
- Describe your company composition—types of employees, locations, and so forth.

From the responses to these and other questions, you will begin to understand the health issues important to the client, and you will also gain a sense of the client's personality, leadership, and organizational style. Using this background information, craft key messages to resonate with the client's way of seeing his or her business. Validate the client's perceptions about the results of taking action and make supportive statements when he or she identifies potential positive outcomes. Clarify the consequences of not taking action, as well as the benefits of taking action. This helps to motivate a decision-maker to take action.

Prepare for and respond to client "objections." At some point, you are likely to encounter client objections to your proposal. A client may object due to a lack of interest in a health and wellness program. Sometimes clients object because they are interested in your proposal, but need further information. Always treat *every* objection with respect and diplomacy. Plan your responses to potential objections in advance, and ask a co-worker to role-play a cautious employer.

Use the following communication techniques to respond to objections:

- Use open-ended questions to help uncover or clarify "real objections."

Example: If a client says he or she can't implement a program because of an upcoming busy period, it might be that the company is short staffed, or doesn't have

the needed skills to carry out the program. To clarify, use open-ended statements like, "Are you saying that ..." "Are you concerned about ..."

- Employ the "yes, and" technique. Agree with (validate) the client's response (the yes) and then offer them new information.

Example: "I realize that August and September would be a busy time, but we're flexible with our schedule and would be willing to wait until a time that is more convenient for your staff."

- Provide proof. Part of preparing for one-on-one discussions with decision-makers is to bring along documentation to support your recommendations and claims.

Examples: If an employer wants to see evidence of cost savings, provide copies of relevant journal articles. If you are asked to verify your claim that a specific company has benefited from this approach, you could present a letter of support from that company.

Summarize your discussion before the close. Based on your initial discussion with the client, develop a picture of his or her concerns and how your strategies will address them. By the end of the discussion, it may be helpful to summarize the client's concerns and your recommendations before asking for a commitment.

Example: "I know that you are concerned about taking time away from staff to implement these programs. You're also concerned about the rising costs of health insurance and whether these cardiovascular health approaches will impact these costs. I've shown you how cardiovascular health programs can reduce these costs and improve employee productivity over time. Do you think this program will address your concerns? If so, the next step in this process is to . . ."

Use close-ended questions to reach a commitment. In the early stages of this process, the focus was on open-ended questions as a method for identifying a client's needs. Educating or presenting information to clients is an important first step. However, to reach the commitment stage, focus on close-ended questions, those requiring a "yes" or "no" answer to a proposal that contains a "who, what, where, how, and when." A decision has not been made until these elements have been addressed.

When is a decision-maker willing to commit to the next step? When a client is willing to move forward, he or she may:

- Ask about availability, such as, "How soon can someone be here?"
- Ask specific questions about rates or prices, or make statements about affordability.
- Ask about features, timing, policy specifics, quality issues, etc.
- Relate personal experiences about friends or relatives who have suffered from a heart attack or stroke.

- Ask positive questions about the presenter's organization, program proposal, or partners.
- Ask for more in-depth information about some facet of the proposal.
- Make statements about similar activities that the company implemented but that did not succeed. The client is seeking reassurance that the proposed approach will deliver results.
- Request a presentation for another company representative.
- Ask about other organizations that have adopted this approach or the names of individuals who can provide testimony. (Have a list on hand of pre-approved organizations that the client can contact.)

Remember to *stop talking* when asking a closed-ended question. Give the employer the opportunity to say "yes!"

Follow up. Congratulations! You have persuaded your client to move ahead with a heart disease and stroke prevention program at the company's worksite. It is important to be able to follow through with the agreements you reached with the client. Follow-up helps establish the state program's credibility in the field and, more importantly, provides a referral that can help you promote these programs with other employers.

Summary

Keep in mind the following reminders and tips that can lead to success:

- Present the program and your proposal with passion. Enthusiasm is infectious.
- Set realistic objectives for the presentation and what you want the decision-makers to do by the close of the presentation. What's the "call to action?" Have fallback steps, but always strive to move the client ahead.
- Be a good listener and let clients talk 90 percent of the time; they'll *tell you* how to convince them to take action.
- Use testimonials from model worksites or from decision-makers who have had success adopting heart disease and stroke prevention policies and programs.
- Don't be afraid to ask for a commitment. Do not end the meeting without finalizing the "who, what, where, and when" of the next steps.
- Limit how many choices you offer during an interaction. For example, when presenting options for next steps, try to keep it simple. Too many options may prove overwhelming and your client may not choose anything.

- Follow up, follow up, and follow up again. Decision-makers often need to hear the same message several times for it to become legitimate in their minds. That is why it is important to communicate with them repeatedly and through various channels (media, mailings, presentations, partners, etc.)

Note: These guidelines were adapted from *Creative Selling: The Competitive Edge*, authored by James L. Brock, College of Business, Montana State University, Bozeman, Montana; Keith K. Cox and James E. Stafford, Professors of Marketing, University of Houston, Houston, Texas; and Art Palmer, Doctoral Student, University of Houston, Houston, Texas.

<http://www.sba.gov/library/pubs/mt-1.doc>

VIII. TIP SHEETS AND RESOURCES

The following section offers tip sheets, samples and resources to help you plan and orchestrate employer-focused heart disease and stroke prevention activities, including:

- Key messages.
- A sample letter to business organizations.
- A guide to gathering health and economic costs in your state.
- A heart disease and stroke prevention and business workshop planning tool.
- Sample workshop agendas.
- Highlights of state heart disease and stroke prevention program worksite efforts already in action.
- A guide to available resources.

Key Messages

Key messages should form the foundation for all your communication activities. Weave them throughout all elements, whether writing letters to partners, creating short news briefs, developing a presentation for business leaders, meeting one-on-one with an employer or health plan benefits manager, or leading a council meeting.

The following key messages have guided CDC's work on this project. State programs may wish to tailor or adopt them for their outreach efforts.

1. Heart disease and stroke (cardiovascular disease) are the nation's leading causes of death. Heart disease is a leading cause of permanent disability among working age adults. Heart disease and stroke are also the most expensive health conditions to businesses. The good news is that employers may save on health care costs by taking action.
2. Investing in worksite health promotion and heart disease and stroke prevention benefits and services can help save a business money. Employers can improve employee

cardiovascular health and productivity, and yield a \$3 to \$6 return on investment per dollar spent over a two to five year period by establishing comprehensive worksite health promotion programs.

3. Employers from small to large are getting an excellent return on their investment in heart disease and stroke prevention benefits and services.
4. A comprehensive health promotion program should include health risk assessments and screenings, sustained individual follow-up risk factor counseling, and lower-cost policy and environmental interventions, which are the most effective approaches to support healthy lifestyles and prevent heart disease and stroke.
5. When selecting a health plan, ensure that it provides essential preventive benefits and delivers quality care for heart disease and stroke prevention. Businesses can and should negotiate a health plan benefits package that will meet the needs of their employees.
6. By establishing a partnership with their state or local health department's heart disease and stroke prevention program, employers can increase the likelihood of having a successful worksite heart disease and stroke prevention program.

Sample Letter to Business Organizations

[ON LETTERHEAD]

Dear [business organization contact]:

Every business is looking for ways to control health care costs. In 2002, U.S. employers paid an average of about \$18,618 per employee for health care and lost productivity costs. Heart disease and stroke, also known as cardiovascular diseases, are two of the most expensive diseases for employers, and they are leading causes of premature, permanent disability in the U.S. labor force. [If data are available, you may opt to replace the numbers above with state-specific figures.]

Businesses can improve employee health and save on these costs by investing in heart disease and stroke prevention benefits and services for their employees. In addition to reducing health care costs by at least 25%, a healthier work force can lead to significant gains in employee productivity and decreased absenteeism. In fact, an independent review of nine businesses that invested in health and productivity management found return on investment estimates ranging from \$1.40 to \$4.90 per dollar spent over a 2 to 5 year period.

The [NAME] State Program is launching an initiative [OR PROGRAM] to inform employers of how they can have a healthier work force and save on health care costs through heart disease and stroke prevention programs. We would like to make a presentation to leaders in your [GROUP, AGENCY, or ORGANIZATION] on key business strategies to reduce the financial burden of heart disease and stroke. The presentation covers proven cost-effective methods that have benefited other businesses through services and programs at the worksite and through health plans.

We will provide insight by discussing:

- Other businesses like yours that have successfully implemented health benefits and services to prevent heart disease and stroke,
- Insights on starting a program to lower health care costs and lost productivity rates and improve the health of employees, and
- Tips for negotiating health plan benefits and services proven effective for preventing and controlling heart disease and stroke.

We believe this presentation will be enlightening and useful for your business leaders and employees as they confront the realities of rising health care costs.

I look forward to speaking with you, and will contact you on [DATE] to schedule a presentation on this important information.

In Health, [Name]

[Title] [Organization/Affiliation]

Gathering Health and Economic Costs

Business leaders relate to bottom line numbers: How much is health care costing them? What are the top chronic conditions affecting employers, and where do heart disease and stroke fall among these conditions? What is the average amount a particular company is spending on health plan benefits and services, and what services are included in these health plan packages?

Whenever possible, refer to health and economic statistics that will “hit home” with employers and business leaders. The resources below offer state and county data and credible bottom line health care costs and statistics.

The CDC State Heart Disease and Stroke Prevention Program website (www.cdc.gov/cvh) offers information and related links on:

- State heart disease and stroke maps, by county.
- National heart disease maps, by county.
- Atlases of Heart Disease and Stroke Mortality: racial, ethnic and geographic disparities in the United States, by county.
- **State-specific Behavioral Risk Factor Surveillance System (BRFSS) data** provides information and trends of selected health risk factors in each state and in the nation (www.cdc.gov/brfss).

State health departments can provide county-level data that show where the rates for heart disease and stroke are highest in a given state.

The Employee Benefits Research Institute (EBRI) (www.ebri.org) is the only nonprofit, nonpartisan organization committed exclusively to data dissemination, policy research, and education on economic security and employee benefits. This website offers fact sheets and issue briefs relating to employers and health care costs.

Chambers of commerce are the traditional source of local and regional information on businesses (www.chamberofcommerce.com).

The **resources section of this *Toolkit*** lists additional organizations and federal agencies that can provide reliable information on specific health care cost data.

Heart Disease and Stroke Prevention and Business Workshop Planning Tool

A heart disease and stroke prevention workshop can increase your program's exposure to employers and business leaders. Conducting a workshop will take planning, organization and commitment from the state program team and one or more partners. It is important to partner with an influential business group, coalition, or organization who can invite its membership to the workshop. It is also advantageous to use a venue that is convenient and attractive for business people, such as a hotel or chamber of commerce. The following workshop planning tool can be adapted to meet state program needs.

Activity	Responsibility	Date Completed
Partners, workshop participants, program content		
Secure a partner to help develop the workshop. Consider partnering with state or local business groups or organizations, etc.		
Secure a sponsor who will pay for food and beverages. Consider contacting businesses, local clinics or hospitals, etc.		
Decide on the target audience (large or small employers, public or private employers, occupational health nurses, human resources and benefits managers, etc.).		
Identify and invite guest speakers. Consider speakers who are able to make the business case on the impact of comprehensive heart disease and stroke prevention programs.		
Hotel logistics		
Secure rooms for out-of-town speakers.		
Secure conference room and plan menus if serving food.		
Work with hotel regarding AV needs (computer rental, LCD projector, microphone, lavalier, tables, etc.).		
Media and marketing		
Determine how you are going to promote the workshop and create a promotion plan.		
Develop a press release, media alert, and any other media or marketing materials. Obtain partner approval of materials.		
Work with your media team on distributing the materials and contacting the media to secure their interest and story placement.		
Registration		
Print name tags for each person who pre-registers.		

Activity	Responsibility	Date Completed
Event signage		
Print tent cards for the registration table and the educational materials table.		
Develop meeting signage (podium sign, meeting room poster, lobby directional signs, etc.). Work with hotel regarding placement of posters. Include partner logos on signage.		
Invitations		
Develop hardcopy and electronic invitations. Provide the option to register online or via telephone. List the relevant URL in the invitation.		
Send hardcopy invitations. Consider using an envelope design or color that will stand out among other pieces of mail.		
Develop an online registration form. Track the number of people who have pre-registered.		
Workshop packets—include the following:		
Folders with pockets. Consider putting a workshop title sticker or your state program logo on the cover.		
Reducing the Risk of Heart Disease and Stroke: A Six-Step Guide for Employers.		
Workshop agenda.		
Speaker bios.		
Printed copies of speaker presentations (in handout format so attendees may take notes), as well as an electronic copy on a CD.		
CDC or state-specific fact sheet on cardiovascular disease.		
CVD literature (booklets/pamphlets) from your state program or other partners such as American Heart Association, National Stroke Association, etc.		
Work with partners and local chambers of commerce, as well as other business and health organizations, to distribute the invitation and promote the workshop to your target audience.		
Evaluations		
Develop an evaluation form to assess how well the workshop addressed the needs of your audience.		

Post-workshop activities		
Activity	Responsibility	Date Completed
Debrief with your partners on what did or did not work. Use this information to plan your next workshop.		
Follow up with those who attended the workshop to see how you can continue to meet their needs.		

Sample Agenda for a Full-Day Workshop*

Time	Activity
08:45 – 09:00 a.m.	Welcome and Introductions
09:00 – 10:30 a.m.	Healthy Solutions for Runaway Health Costs
10:30 – 10:45 a.m.	Break
10:45 – 12:00 p.m.	Modern Medical Partners—A Better Way
12:00 – 12:30 p.m.	Lunch
12:30 – 02:00 p.m.	Health Benefits—The Future/Changing Outcomes
02:00 – 02:15 p.m.	Break
02:15 – 03:45 p.m.	Assessment/Analysis and Case Studies
03:45 – 04:00 p.m.	Wrap-up

Sample Agenda for a Lunch-and-Learn Program

Time	Activity
12:15 – 12:30 p.m.	Welcome and Introductions
12:30 – 12:50 p.m.	Heart Disease and Stroke Prevention: A Business Challenge
12:50 – 01:20 p.m.	Health Benefits—The Future/Changing Outcomes (with company testimonials)
01:20 – 1:30 p.m.	Wrap-up

**Courtesy of the Georgia Department of Human Resources, Cardiovascular Health Initiative.*

Examples of State Heart Disease and Stroke Prevention Programs:

Highlights of Worksite Efforts Already in Action

As you initiate your efforts with the business sector, you may derive insight from the experiences of states that have already launched similar activities.

North Carolina

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The North Carolina Heart Disease and Stroke Prevention Program has worked with North Carolina Prevention Partners (NCP) to increase coverage of preventive benefits within the state. So far, the Building Alliances with Health Systems to Integrate Preventive Care (BASIC) Preventive Benefits Initiative has succeeded in increasing the number of health plans offering coverage for assessment and counseling of tobacco use and nutrition.

In the next phase, this initiative will create a tool to help purchasers of health benefits make the business case for purchasing prevention benefits, and then will train purchasers on using the tool. The initiative has expanded to reach public health plan providers in North Carolina, including the State Employee Health Plan. Staff are working to increase statewide awareness of ways to improve health and prevent and manage diseases. In addition, NCP has been surveying health plan providers regarding efforts to improve disease management programs for high blood pressure, high cholesterol, and diabetes. This partnership between the health department, health plan providers, and employers should result in improvements in the health status of employees and cost containment for health plan providers and employers.

Georgia

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The Georgia Department of Human Resources (GDHR) has partnered with employers throughout the state to create a workshop entitled *Healthy Solutions, the Business of Good Health*. This workshop, which has both a half-day and full-day version, is conducted by a

professional team that addresses the following topics: return on investment for worksite health promotion, game theory for rational decisions, pro-active health benefits design, ways to identify and engage partners, and examples of promising practices. The workshop identifies essential program elements and other recommendations for implementing successful programs. GDHR assisted the company TI Automotive to initiate a strategic business and health plan, entitled “Seven Essential Elements in Risk Reduction”. This company partnered with a hospital to conduct employee health screenings. GDHR also worked with Fieldale Farms Corporation, which allocates 2.5% of its health care budget to facilitate preventive health care strategies and offers screening and risk reduction to over 4,000 of its employees. As a result, a significant number of these employees have normalized their blood pressure and cholesterol levels. The company also reduced its health care costs for its employees to less than half the national average.

Maine

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The Maine Heart Disease and Stroke Prevention Program has spent the last two years developing and managing a pilot project with 40 employers who have implemented policy and environmental changes to support heart health. The strategies are low-or no-cost, easy to apply, and feasible for any type of employer. In addition, the Maine Health Department has completed the *Good Work Resource Kit*. The kit includes information on the link between healthy work environments and a business’s bottom line, key elements of successful worksite wellness programs, and successful cardiovascular health programs used by large and small Maine employers. These programs include such topics as cholesterol screenings and follow up, nutrition, physical activity, and tobacco avoidance. The Cardiovascular Health Program is now partnering with wellness councils, employer associations, and public health organizations across Maine to rapidly increase the number of employers (large and small) who are addressing employee health. As a complementary resource to the tool kit case studies, examples for secondary prevention are also available.

The materials in the kit provide local health departments with guidance on how to develop partnerships that will support, facilitate, or advocate for the inclusion of primary or secondary prevention initiatives in worksites. Partnerships between health departments, employers, and health care organizations can help employers provide an environment in which employees can learn, adopt, and maintain healthy habits, resulting in healthier, more productive employees and reduced health care costs to employers. State health departments can provide employers with the technical expertise, experience, training, and materials needed for such efforts.

Montana

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In 2003, the Montana health department conducted a workplace intervention among 523 Montana state employees to increase awareness of the signs of heart attack and the need to call 9-1-1. All employees received an *Act in Time to Heart Attack Signs* brochure and wallet card with their paychecks. *Act in Time* posters were placed in key workplace areas. A weekly e-mail message, including a contest entry opportunity addressing the signs and symptoms of heart attack, was sent to all employees. To evaluate the intervention, baseline and follow-up telephone surveys were conducted. This low-cost workplace intervention was found to be effective in increasing employee awareness of the signs of a heart attack and the need to call 9-1-1. Awareness increased significantly among employees from baseline to follow-up, in both older and younger employees. While 69% of respondents correctly reported five or more of the signs of heart attack at baseline, 89% correctly reported the signs at follow-up.

Available Resources

The following organizations provide additional resources to help establish heart disease and stroke prevention programs.

Organization	Available Resources
American Heart Association 7272 Greenville Avenue Dallas, TX 75231-4596 www.amhrt.org	<ul style="list-style-type: none"> • A-Z Guide for Heart and Stroke Information • Heart attack prevention • Stroke prevention • Statistics on heart and stroke • Related publications
Alliance of Community Health Plans 2000 M Street, Suite 201 Washington, DC 20036 www.achp.org	<ul style="list-style-type: none"> • Health plan best practices • Partnership opportunities to collaborate on solutions to health care challenges
American Red Cross National Headquarters 2025 E Street, NW Washington, DC 20006 www.redcross.org	<ul style="list-style-type: none"> • Courses on how to administer Cardiopulmonary Resuscitation (CPR) and use automated external defibrillators (AEDs)
American Stroke Association National Center 7272 Greenville Avenue Dallas, TX 75231 www.strokeassociation.org	<ul style="list-style-type: none"> • Health information on stroke • Community, patient, and professional outreach • Advocacy • Related publications
America's Health Insurance Plans 601 Pennsylvania Avenue Suite 500 Washington, DC 2004 www.ahip.org	<ul style="list-style-type: none"> • Information on the health care financing industry • Best practices, tools, and resources
Association of Worksite Health Promotion 60 Revere Drive Suite 500 Northbrook, IL 60062 www.awhp.org	<ul style="list-style-type: none"> • Best health promotion practices in worksites • Methods, processes, and technologies for worksite health promotion • Related publications
U.S. Centers for Disease Control and Prevention 1600 Clifton Road Atlanta, GA 30333 www.cdc.gov/cvh	<ul style="list-style-type: none"> • Health topics A-Z • Health statistics and prevalence of cardiovascular disease (CVD) • Resources for CVD prevention

Organization	Available Resources
<p>National Business Group on Health 50 F Street N.W., Suite 600 Washington, DC 20001 www.nbgh.org</p>	<ul style="list-style-type: none"> • Workplace and employee wellness information • Cardiovascular health strategies at worksites • Local coalitions
<p>National Business Coalition on Health 1015 18th Street NW Washington, DC 20036 www.nbch.org</p>	<ul style="list-style-type: none"> • Resources provided to member community coalitions who organize their purchasing power to buy health plan benefits • Advocacy information for local coalitions and national legislators
<p>National Committee on Quality Assurance 2000 L Street, NW Suite 500 Washington, DC 20036 www.ncqa.org</p>	<ul style="list-style-type: none"> • Report Card on quality health plans • HEDIS performance measures for specific diseases and conditions, to compare the performance of managed health care plans
<p>National Health Information Center Office of Disease Prevention and Health Promotion U.S. Dept. of Health and Human Services P.O. Box 1133 Washington, DC 20013 www.health.gov/nhic/</p>	<ul style="list-style-type: none"> • Health Information Resource Database of 1,100 organizations and government offices that provide health information upon request
<p>National Stroke Association 9707 E. Easter Lane Englewood, CO 80112 www.stroke.org</p>	<ul style="list-style-type: none"> • Patient, caregiver, and general education and information • Health professional information • Advocacy information to promote stroke prevention and treatment
<p>National Heart, Lung and Blood Institute P.O. Box 30105 Bethesda, MD 20824 www.nhlbi.nih.gov</p>	<ul style="list-style-type: none"> • Health information • Cholesterol, heart disease, and high blood pressure information and materials • Scientific publications • Research and funding opportunities
<p>National Institute of Neurological Disorders and Stroke (NINDS) National Institutes of Health 6001 Executive Boulevard Suite 3309 Bethesda, MD 20892- 9531 www.ninds.nih.gov</p>	<ul style="list-style-type: none"> • Research • Funding and grant opportunities • Scientific publications • Health information
<p>Wellness Councils of America (WELCOA) 7101 Newport Avenue, Suite 311 Omaha, NE 68152 www.welcoa.org</p>	<ul style="list-style-type: none"> • Workplace and employee wellness programs • Local chapters in some states

Research Findings for the Toolkit

Key findings from a literature review and interviews with employers, health plan providers, and public health officials

Most promising interventions for CVH in worksite settings. A comprehensive health promotion program that includes sustained individual risk reduction counseling for employees and lower-cost policy and environmental interventions is the most effective approach for supporting healthy lifestyles and preventing heart disease and stroke.¹⁻⁶ Program components include:

1. Screening and referrals of high-risk employees with effective treatment and individual risk factor education and counseling follow-up.
2. Organization-wide environmental supports for behavior change (e.g., frequent and simple prevention messages, health education classes and support groups, access to healthy low-cost food choices, and opportunities to engage in physical activity).
3. Financial and other incentives to motivate employees to participate and comply with prevention and treatment goals (e.g., gift cards, lower health insurance premiums, tuition reimbursement).
4. Corporate policies that support healthy lifestyles (e.g., tobacco-free policies).

Most promising practices in health care settings. Health plans that provide coverage for essential preventive services and have systems to deliver quality health care can maximize cardiovascular health and productivity.⁷⁻⁸ Key system components include:

1. Health care practices and systems that adhere to standardized prevention and treatment protocols consistent with national guidelines for heart disease and stroke prevention.
2. Clinical care teams that deliver quality patient care.
3. Clinics that specialize in the treatment and prevention of risk factors (e.g., high blood pressure).
4. Physician and patient reminders via automated record systems.
5. Electronic medical record systems that allow providers to identify and treat high-risk patients in a timely and efficient manner.

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